



NC E-Procurement Upgrade Go-Live Postcard #6

School System Edition

Try the Upgraded NC E-Procurement We have opened a training web site that gives all users an opportunity to try out the upgraded NC E-Procurement before it goes live in July. It is **available now**, so try it out and see the new features that will be covered in training. There are a few guidelines to keep in mind when using this web site:

- The training web site is located at *[removed]*. When you access this site, you will see a message, "There is a problem with this website's security certificate". Select the "Continue to this website" option.
- User name is your **current NC E-Procurement user name**, and the password is *[removed]*. Though you will use your current NC E-Procurement user name to log into the training web site, please remember that this user name will not work in the upgraded system when it goes live. You will need to log into the upgraded system using your NCID.
- There is a limit to the number of users who can access the training site at one time. If you receive a message stating that the maximum number of users has been reached, please try again at another time.
- This is a training environment, so purchase orders and email notifications will not be delivered.

Feature Focus: Standard Reports The upgraded NC E-Procurement will have some new features designed to improve the performance of running reports. There will be two versions of several common requisition and order reports: a "Live" report version and a "Historical" report version. **Live reports** include data from the live system, limited to the last 90 days. Live reports can show you data from "today". **Historical reports** do not pull from the live system but provide a snapshot of the data that is updated nightly. Historical Reports show only data from "yesterday" or "last week". They are currently set to display up to two years of data. Historical report versions will only display transactions from the new system. If you need to run a report on data from the old system, you will need to do so in the old system. For more information about reporting, including a list of reports available by user role, please view the Standard Reports job aid on the [Upgrade Job Aids](#) web page.

The screenshot shows the 'Reports' screen in the NC E-Procurement system. On the left, there is a sidebar with three steps: 1. Select Category, 2. Select Report, and 3. Run Report. The main area displays a list of reports with their descriptions and data return periods. The reports are categorized into 'Live' and 'Historical' versions. A yellow callout box with the text 'Notice the difference between the "Live" and "Historical" versions.' points to the 'Requisition Detail' and 'Requisition Detail (Historical)' reports. The 'Requisition Detail' report is highlighted with a yellow background and shows a description: 'Summarizes a group of requisitions, showing both header and line item information. Data returned will be limited to 90 days from today's date.' The 'Requisition Detail (Historical)' report is also highlighted with a yellow background and shows a description: 'Summarizes a group of requisitions, showing both header and line item information. Data returned will be up to 2 years from today's date.' Other reports listed include 'Requisitions to be Approved', 'Requisition Summary', and 'Requisition Summary (Historical)'. The screen has navigation buttons at the top right (Prev, Next, Exit) and bottom right (Prev, Next, Exit).

Year-End Key Dates Please keep in mind some key fiscal year-end dates related to the upgrade:

- Friday, June 22nd, at 5 PM is the deadline for entering **new** requisitions that originate in NC E-Procurement.
- Thursday, June 28th, at 5 PM is the deadline for making any updates to existing transactions. After this date, new transactions can be initiated in back-end financial systems but will not be processed in NC E-Procurement until go-live.
- Tuesday, July 3rd or Thursday, July 5th are the potential go-live dates for NC E-Procurement upgrade. We are working with the Office of the State Controller to determine the specific date and will communicate that date when it is finalized.

Please see the calendar below for NC E-Procurement key dates during this timeframe:

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
June 2012	17	18	19	20	21	22 5PM: Deadline for creating new requisitions that originate in NC E-Procurement	23
	24	25 <i>Continue to process existing requisitions and purchase orders</i>	26	27	28 5PM: Deadline for making any updates to existing transactions	29 NC E-Procurement Unavailable *	30 NC E-Procurement Unavailable *
July 2012	1 NC E-Procurement Unavailable *	2 NC E-Procurement Unavailable *	3 Potential Go-Live Date #1 (working with OSC to determine date)	4 State Holiday - Closed	5 Potential Go-Live Date #2 (working with OSC to determine date)	6	7

* New transactions can be initiated in back-end financial systems but will not be processed in NCE-Procurement until go-live

Follow-Up

We sent this postcard to NC E-Procurement school system users, purchasing directors, and finance officers.

Questions about information covered in this Postcard? Send an e-mail to: ephelpdesk@its.nc.gov